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A WIDE-OPEN Field for Independent Financial Advisors

Spire Investment Partners, LLC

“Open” is the word that best captures the spirit and intent of Spire Investment Partners. So says Spire’s CEO, David Blisk, who’s long been a champion for the financial advisor who yearns to be free. When Blisk opened Spire for business in 1997, he opened new doors for independent advisors nationwide, giving them access to multiple custodians and fee structures, unlimited investment options, and infrastructure – all without corporate agendas and unreasonable limitations.

“We are simply the means by which advisors grow their business and serve clients’ interests,” Blisk says. “We don’t tell our representatives how to operate. We simply provide the cutting-edge tools they need to succeed and the space to do what they do best.”

“For advisors looking to leave wire houses and establish their own business, Spire is your new home. Spire is both a portal to the wide investment universe and a backbone of support, built to serve all the needs of an investment advisor.”

— David Blisk, CEO

The Freedom to Choose

According to Blisk, true independence starts with having open access to Spire’s major institutional custodial partners – Fidelity, Pershing and Schwab. Spire offers the independent advisor a virtually unlimited menu of investment solutions – on a scale rivaling that of major Wall Street firms – with the freedom to decide where to direct investors’ assets.

As both an SEC-registered Registered Investment Advisory firm (RIA) and a FINRA-member broker-dealer – a rare industry “hybrid” – Spire provides advisors with the flexibility to choose whatever business model or corporate entity they prefer. In fact, the firm acts as a broker-dealer for its own IARs and other RIAs with either state or SEC registrations. Equally important, Spire representatives can select a variety of suitable fee structures to match exactly the needs of their clients.



7918 Jones Branch Drive #750 | McLean, VA 22102 | 888-737-8907
www.spireip.com | www.joinspire.com



David Blisk, CEO

Industry-Leading Support

To compete successfully and become a top-tier producer, independent financial consultants must manage their business intelligently, market themselves effectively and establish a secure, scalable infrastructure.

On each of these fronts, Spire offers invaluable insight and unsurpassed efficiency, security and control. For the entrepreneur, Spire leverages its own startup experience to help financial professionals develop marketing concepts and a plan to gain traction in the marketplace. The firm’s state-of-the-art cloud technology ensures data continuity in the event of any type of emergency or disaster. All Spire support systems – back office, customized compliance, fee billing, commission, data aggregation, reporting and the rest – are on a par with those of the world’s most sophisticated financial firms.

“What I’ve done is allow new independents to step out and, two weeks from now, have exactly what they want – freedom and control,” Blisk says. “Then, they can forge success on their own terms. This is true and open customization. We’re looking for financial advisors who are open to the opportunity for true independence, and who want to have that conversation with us.”